# Axis 360 Administrator User Manual

## June 2014

The information contained in this user manual is confidential and proprietary to Baker & Taylor. No part of this user manual may be distributed or disclosed in any form to any third party without written permission from Baker & Taylor.

**Table of Contents**


1 Introduction ..... 3

*1.1 Site Access and Home Page* ..... *3*

2 Settings ..... 4

*2.1 Library Settings* ..... *4*

2.1.1 Library Site Settings ..... 4

2.1.2 Lending Settings ..... 5

2.1.3 Enable Patron Reviews ..... 6

*2.2 Edit Logo (only for Blackboard users)* ..... *7*

2.2.1 Customize the Link and Icon ..... 7

*2.3 User Management* ..... *8*

2.3.1 Reset a User's Password ..... 8

2.3.2 Change a User's Barcode ..... 9

2.3.3 Merge a User's Barcodes ..... 11

*2.4 User Notifications* ..... *14*

*2.5 Staff Picks* ..... *16*

2.5.1 Adding a Collection to Staff Picks ..... 16

2.5.2 Adding Titles to a Collection ..... 18

2.5.3 Relabel Staff Picks ..... 20

3 Reports ..... 21

*3.1 Available Reports* ..... *21*

3.1.1 Inventory List Report ..... 22

3.1.2 Circulation List Report ..... 22

3.1.3 Hold List Report ..... 23

3.1.4 Inventory Circulation by Month ..... 23

3.1.5 Top 10 Circulating Subjects ..... 24

3.1.6 User Review Report ..... 25

3.1.7 New Users by Month ..... 25

3.1.8 Total Users by Month ..... 26

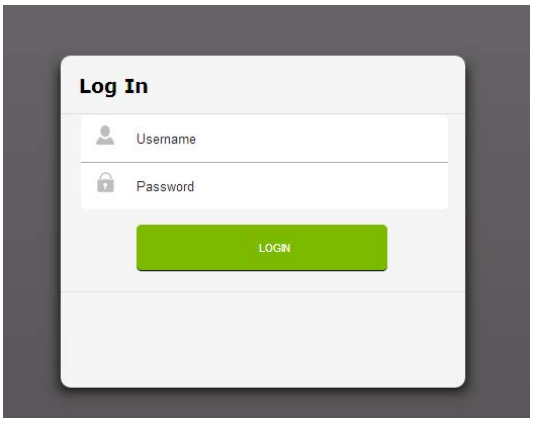
3.1.9 New Users by Month Graph ..... 27
3.1.10 Total Users by Month Graph ..... 28
4 Reviews ..... 29
*4.1 Reviews ..... 29*
4.1.1 Approve or Delete Reviews ..... 29
4.1.2 Blacklisted Reviews ..... 31
5 Appendix ..... 32
*5.1 Hold Queue Management ..... 32*
5.1.1 Move Users in the Hold Queue ..... 32

# 1 Introduction

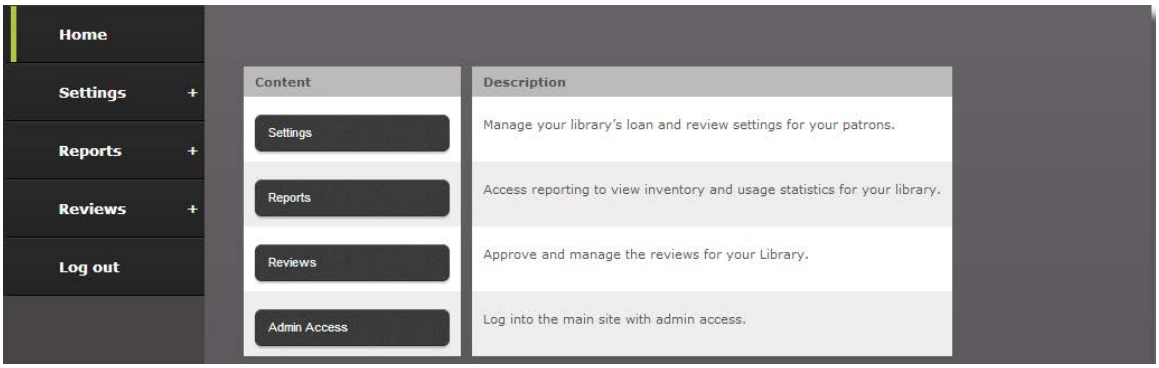
Welcome to Axis 360! As an administrator, you'll have access to the Library Administration portal, where you can edit and customize your Axis 360 site, run reports, manage user reviews and more. This user manual will teach you to navigate and master the system's administration tools.

## 1.1 Site Access and Home Page

To access the Library Administration portal, enter http://[your Axis 360 site URL]/admin. Below is the login page for the Library Administration portal. Enter your username and password and click the LOGIN button.




Once logged in, you'll be directed to the home page, where you can adjust your settings, run reports, approve or delete reviews and access your site as an admin.



# 2 Settings

Here you can access and adjust your library settings, edit your logo and manage users, notifications and staff picks.

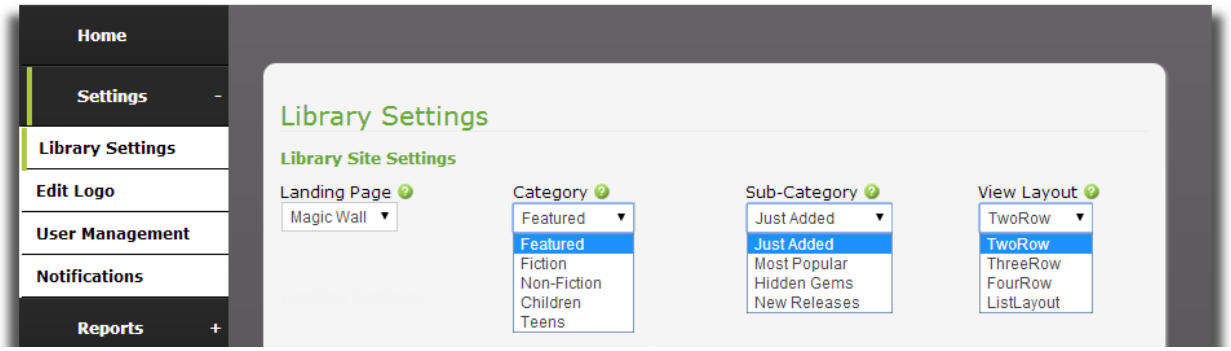
## 2.1 Library Settings

The options available under Library Settings allow an Administrator to control how the site displays, check out and hold parameters, reviews, the tag line and blacklisted words. After any changes are made on this screen, click the Save button.

To view a description of each field, hover over the question mark next to the desired field.

### 2.1.1 Library Site Settings

Use the settings to predetermine how the page will display for your users.



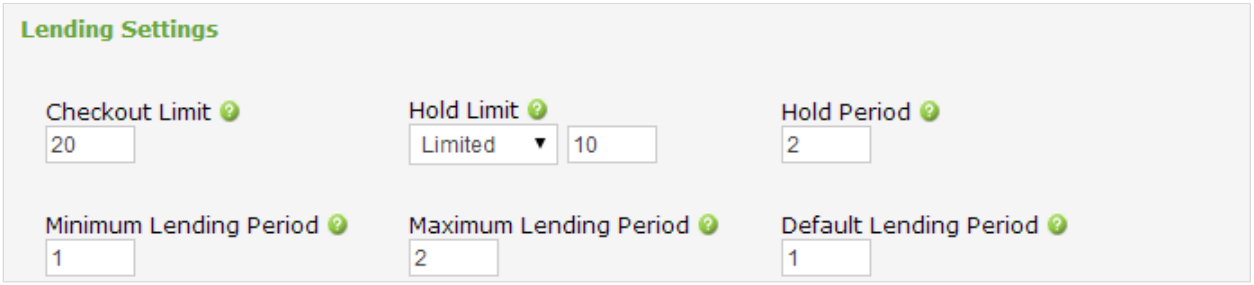

- Landing Page - default page that displays when a user accesses the site
  - Options include: Magic Wall or Staff Picks
    - Note: Selecting Staff Picks removes the Category, Sub-Category and View Layout options
- Category - displays on the left side of the Magic Wall
- Sub-Category - displays at the top of the Magic Wall and allows the user to filter titles by making additional selections
- View Layout - sets the default View Layout for the site

Note: When you purchase new titles you will receive an email when the titles are in your repository. New titles are discoverable by browsing or searching; however, new titles will not display in their respective category on the Magic Wall until the next day.

### 2.1.2 Lending Settings

Administrators may set limits regarding check out, holds and lending limits.

Note: For consortia member libraries, the lending settings are set by the consortia administrator. Please contact your consortia administrator to request any changes to these parameters.




- Check out Limit - maximum titles a user may check out at one time
- Hold Limit - maximum titles a user can have on hold at one time (setting the limit to 0 allows unlimited holds)
- Hold Period - length of time a user has to check out a title after the title is reserved
- Minimum Lending Period - minimum number of days a user can have a title checked out
- Maximum Lending Period - maximum number of days a user can have a title checked out
- Default Lending Period - default number of days a title is checked out when the end user selects Check out Now

### 2.1.3 Enable Patron Reviews

Select Patron Reviews Enabled if you wish to display user reviews of library titles. If reviews are enabled, you are responsible for reviewing and either approving or deleting them. If a review contains any blacklisted words - a list of terms that you establish as potential "red flags" when you set up your Axis 360 site - it will be categorized under the Blacklisted Reviews heading, away from other pending reviews.

When you set up your Blacklisted Words list, use a semicolon (;) to separate each term.

- Patron Reviews Enabled - allows end users to write reviews
- Make My Reviews Public - allows your end user reviews to be visible to other libraries using Axis 360
- View other Public Reviews - see reviews from other libraries that have made their reviews public

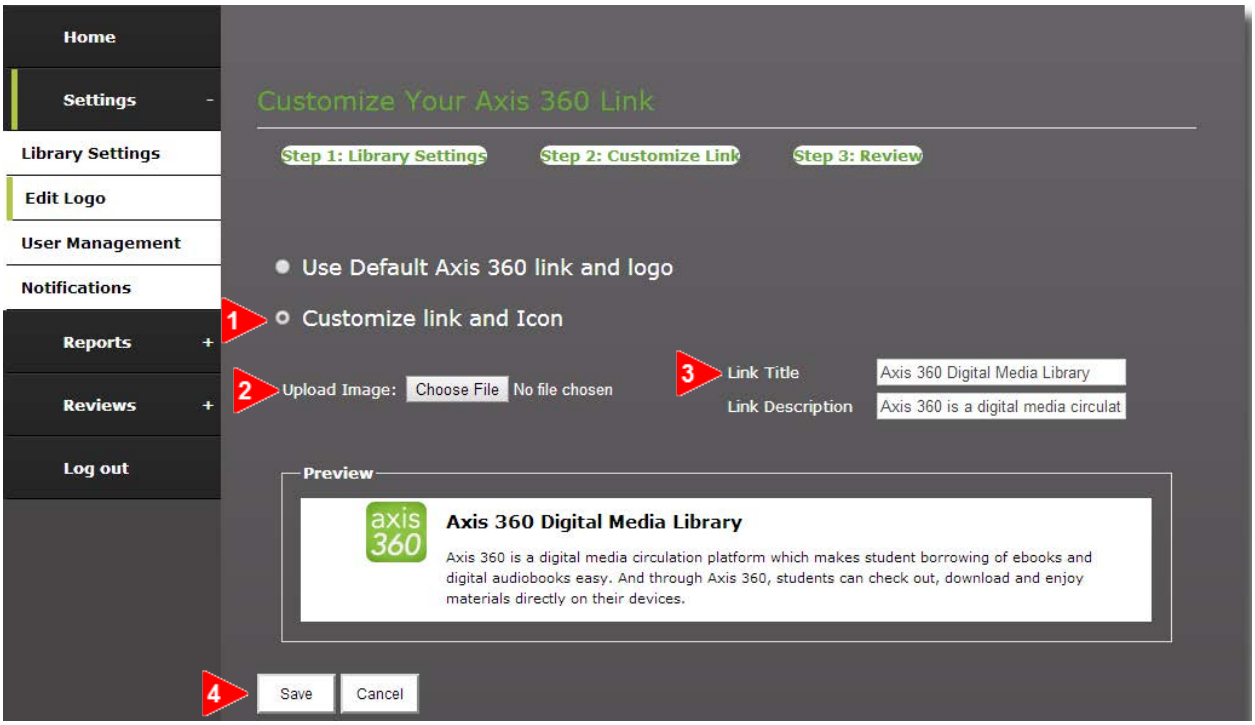
**Tagline**: The welcome message that appears in the top right corner of every page of your Axis 360 site. You may enter a new tagline welcome message at any time, but you are limited to 150 characters.

## 2.2 Edit Logo (only for Blackboard users)

If you are a school using Blackboard's Partner Cloud and Building Block, you have the option to use the default Axis 360 logo or upload your own logo. Other libraries may contact axis360@baker-taylor.com for logo changes.

### 2.2.1 Customize the Link and Icon

You may customize the link and icon displayed on the site.




1. After selecting Settings and Edit Logo, click the **radio button** next to to **Customize link and icon**.

2. Next to Upload Image, click **Choose File**. Attach your desired image. Supported image formats are .png and .jpeg.

3. Enter the **Link Title** and **Link Description**.

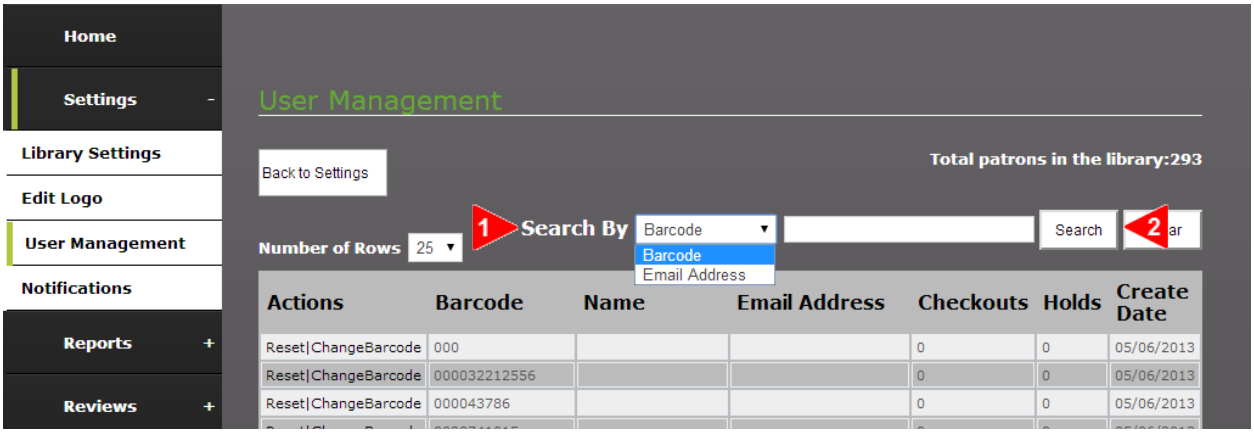
4. Click **Save**.

## 2.3 User Management

For libraries that are not using SIP2, III Patron API, EZProxy or NCIP patron authentication, User Management enables the library to search for users and reset a user's password. All authentication methods allow you to change a user's barcode, or merge barcodes.

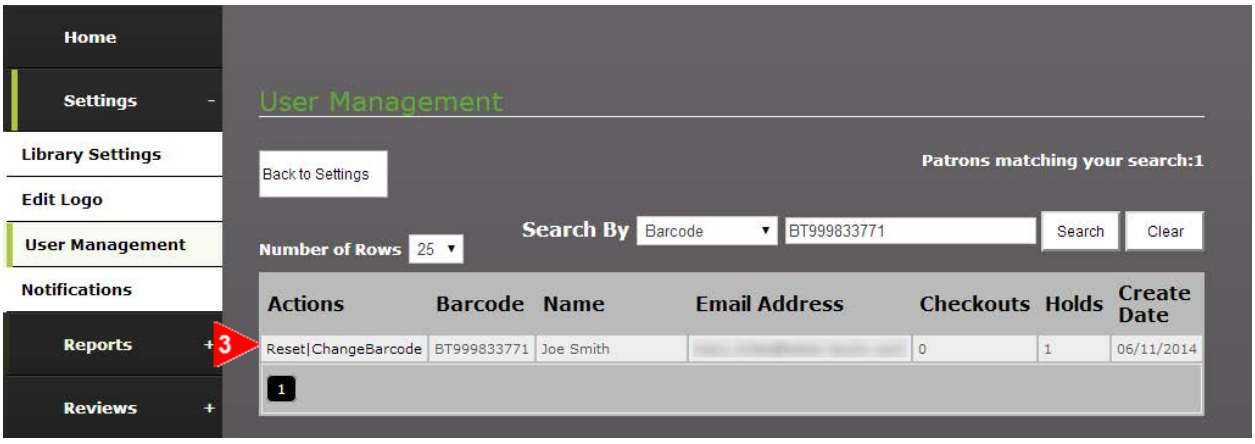
### 2.3.1 Reset a User's Password

You can reset a user's password. The user will then be notified of the new password.

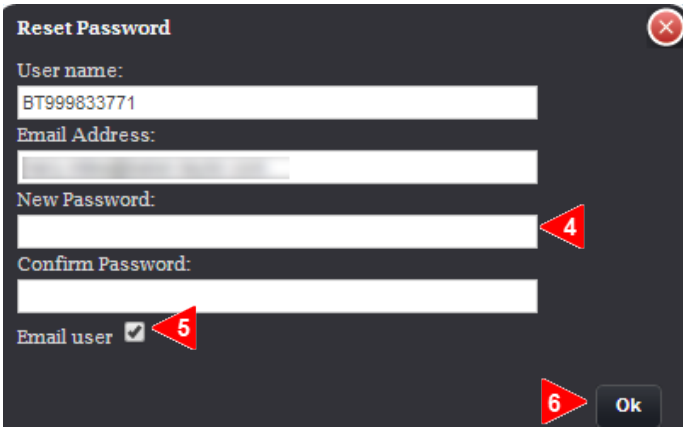



1. After selecting Settings and User Management, search for a user by barcode or email address. Click the **Search By** drop-down arrow and select **Barcode** or **Email Address**. Enter the barcode or email address in the textbox.

2. Once the barcode or email address has been entered, click **Search** or press Enter.




3. Click **Reset**.




4. Enter the new password in the **New Password** and **Confirm Password** fields.

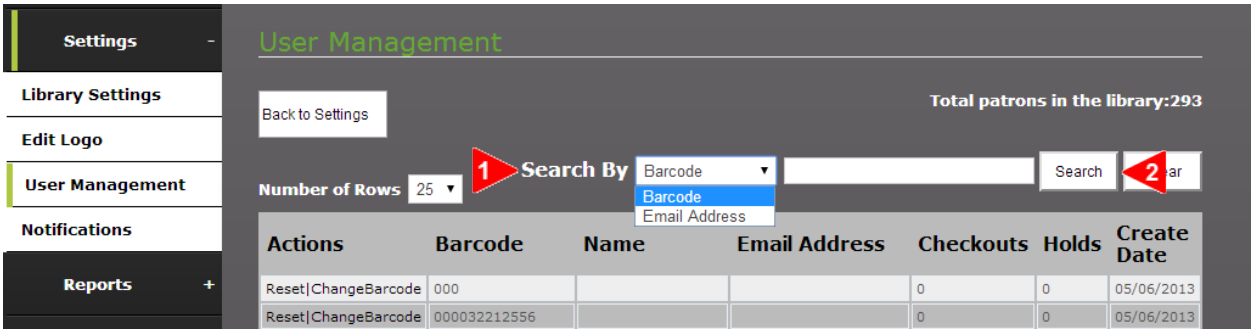
5. The Email user checkbox is selected by default. After you click OK, the user will receive an email containing the new password.

6. Click **OK**.

   You will be returned to the User Management page and a confirmation message displays.

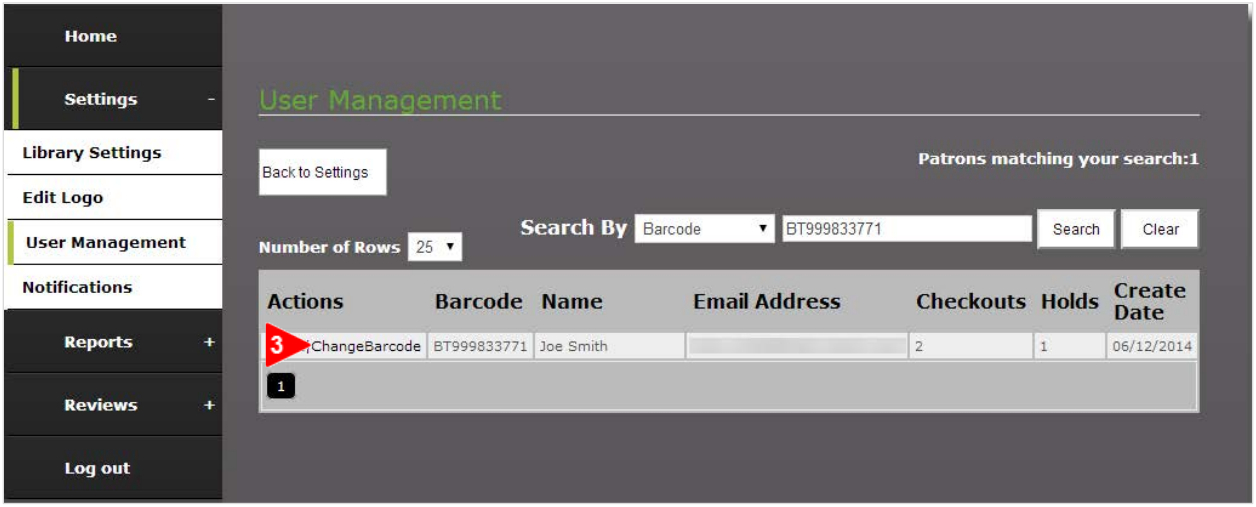
### 2.3.2 Change a User's Barcode

When changing a user's barcode, the user does not lose any titles currently checked out or current holds. These are transferred from the old barcode to the new barcode.

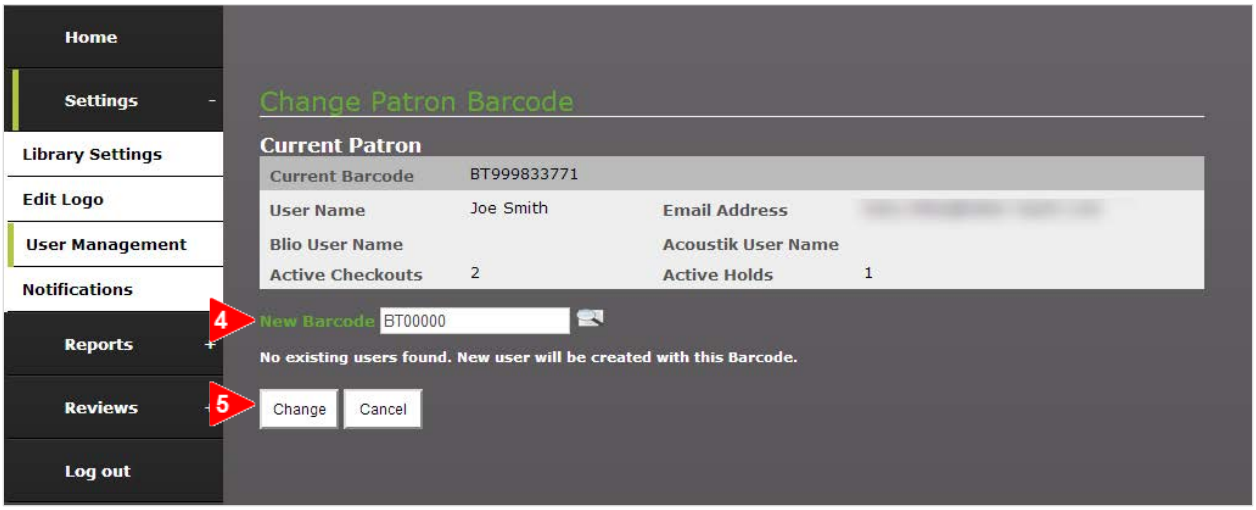



1. After selecting Settings and User Management, you may search for a user by barcode or email address. Click the **Search By** drop-down arrow and select **Barcode** or **Email Address**. Enter the barcode or email address in the textbox.

2. Once the barcode or email address has been entered, click **Search** or press Enter.

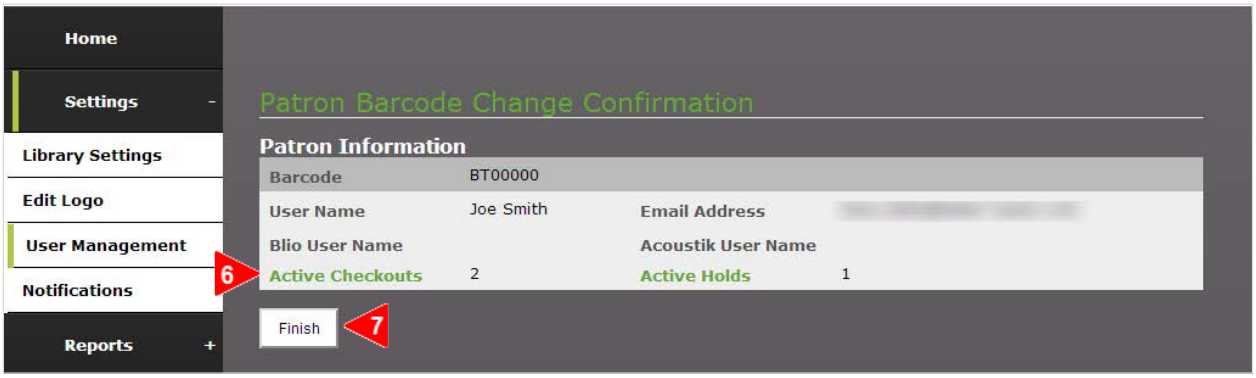



3. Click **ChangeBarcode**.




4. Enter the **New Barcode** and click **Search** to see if it already exists. If the barcode does not already exist, a message will indicate that a new user will be created.

5. Click **Change**.

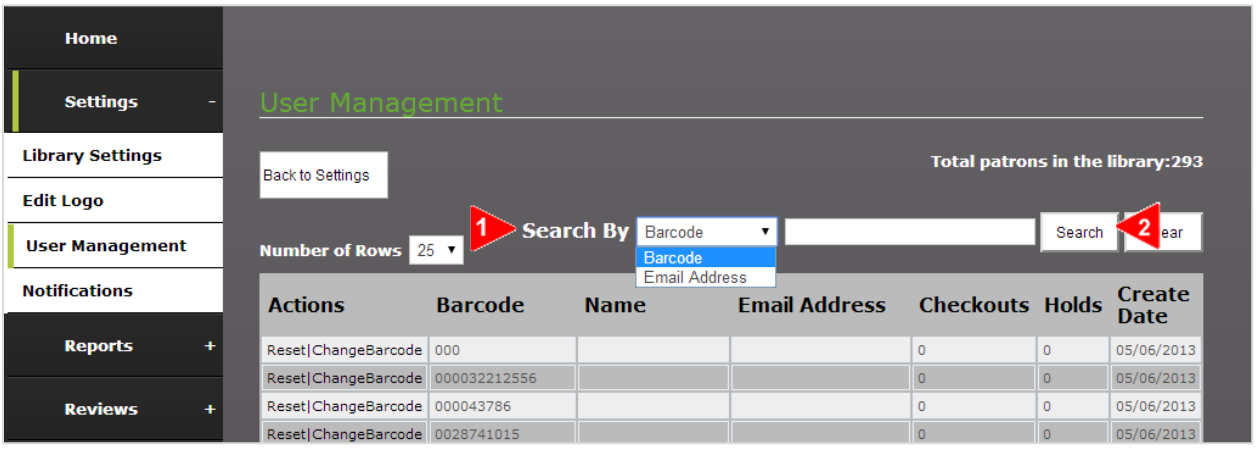



6. To view a list of the **Active Check outs** and **Active Holds** for the user, click the corresponding link.

7. Click **Finish**. The current user's information has been updated with the new barcode and the old barcode has been removed from the system.

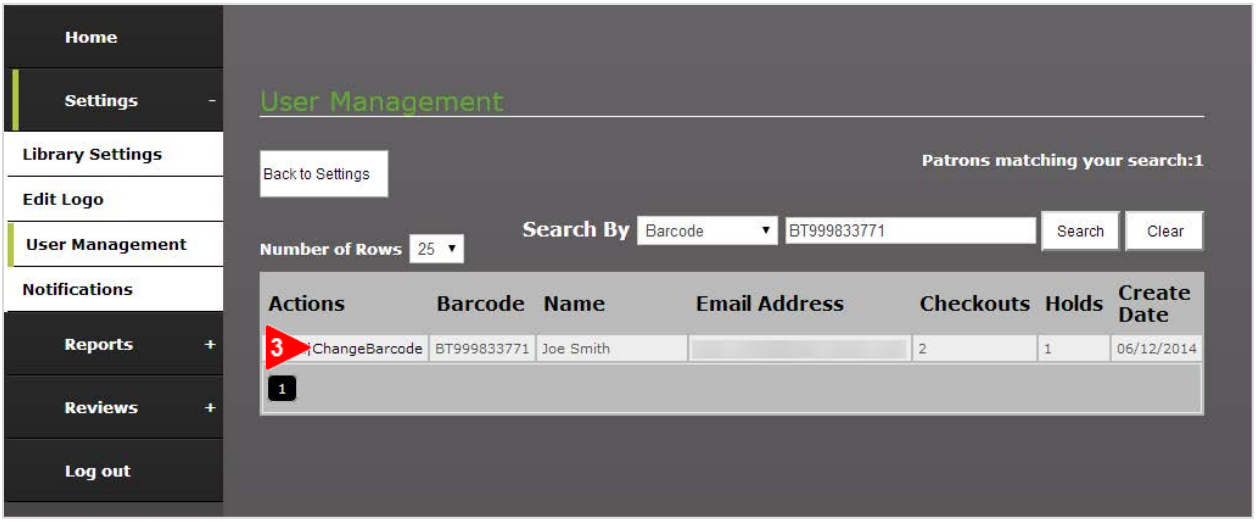
### 2.3.3 Merge a User's Barcodes

When merging barcodes, the user does not lose any currently checked out titles or current holds. For example, if both accounts have the same title checked out, the one with the longer load period is kept. In the case of active holds, the older hold is kept so the patron can get the title as soon as possible.

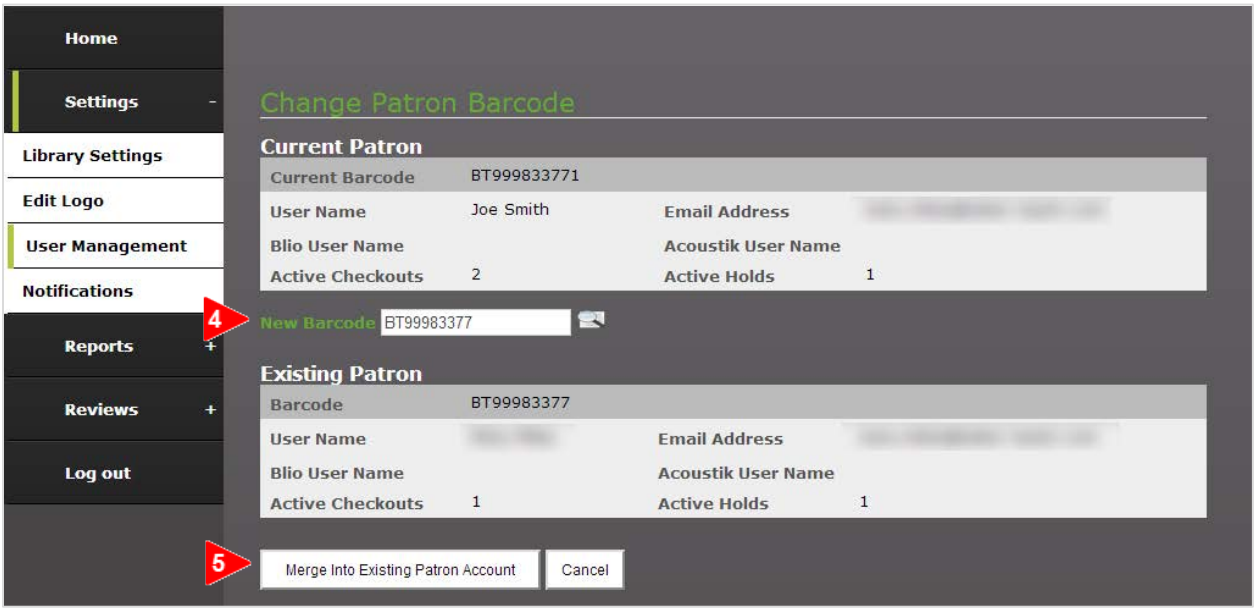



1. After selecting Settings and User Management, you may search for a user by barcode or email address. Click the **Search By** drop-down arrow and select **Barcode** or **Email Address**. Enter the barcode or email address in the textbox.

2. After entering the barcode or email address, click **Search** or press Enter.

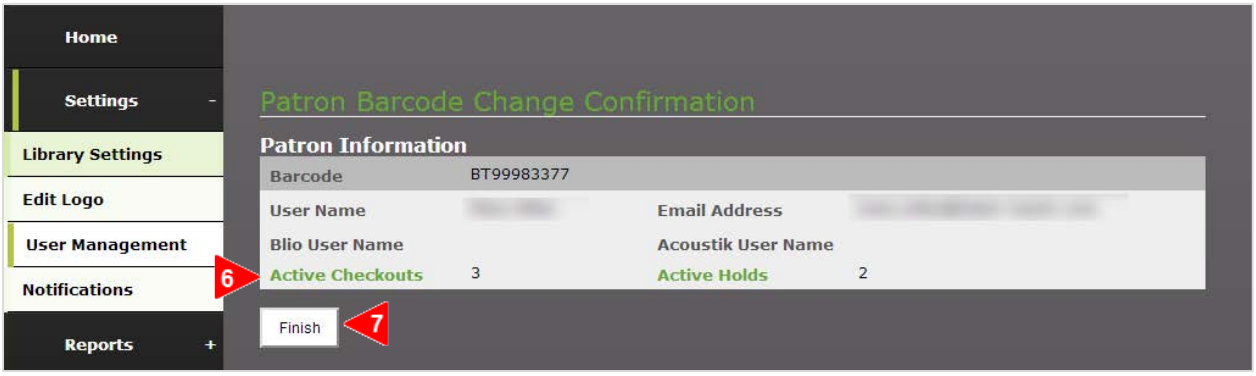



3. Click **ChangeBarcode**.




4. To merge into an existing account, enter the **New Barcode** (existing user's barcode) and click **Search** .

5. Click **Merge Into Existing Patron Account**.



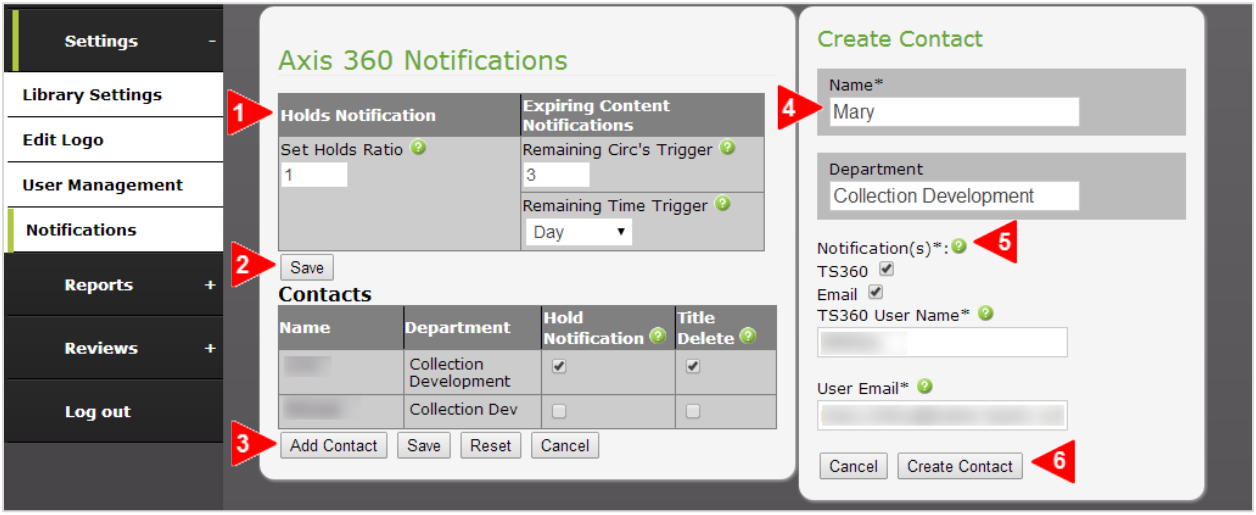

6. The barcodes have been merged. To view a list of the **Active Check outs** and **Active Holds** for the user, click the corresponding link.

7. Click **Finish**.

## 2.4 User Notifications

There are two types of notifications: Holds Ratio Notifications and Expiring Content (circ or time). When set, email notifications are sent when there are more holds than available copies or for titles that are expiring due to circulation or time limits.

### 2.4.1 Setting up Notifications




1. To set up **Holds Notifications**, enter the **Holds Ratio**. To set up **Expiring Content Notifications** enter the **Remaining Circ's Trigger** and **Remaining Time Trigger**.

2. Click **Save**.

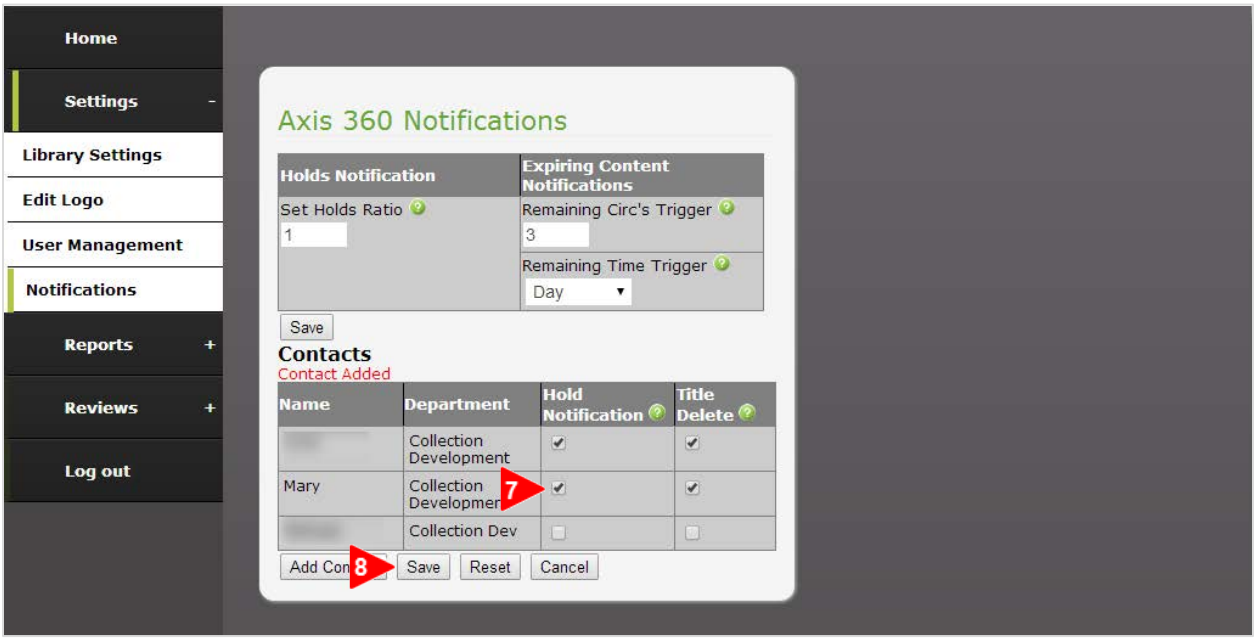
3. Add the contacts who will receive the notifications. Click **Add Contact** to expose the the Create Contact box.

There is no limit to the number of contacts that may be created and receive notifications. A contact may be edited at any time by clicking the name of the contact, editing the desired information and clicking the Update Contact button.

4. Enter the contact's **Name** and **Department**.

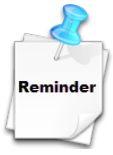
5. Notifications may be sent to a contact in the form of a Title Source 360 cart, an email or both. Select the checkbox next to the **Notification** method. If TS360 is selected, enter the TS360 user name and user email.

6. Click **Create Contact**.




7. The contact has been successfully added. Next, select the checkbox for the preferred type of notification the new contact is to receive: **Hold Notification**, **Title Delete** or both.

8. Click **Save**.




For expiring content, notifications are sent on the trigger period and again when content has expired and has been deleted from the repository.

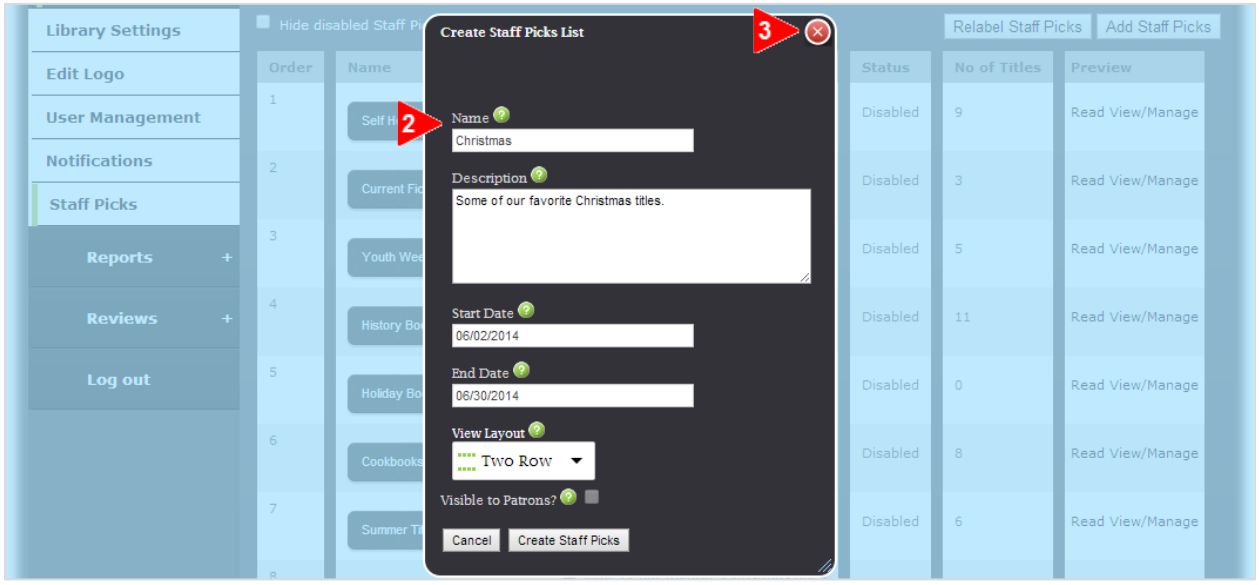
## 2.5 Staff Picks

With Staff Picks, you can showcase selected titles from your collection. Your patrons will see this section when they first log onto Axis 360 if you set it as the Landing Page under Settings > Library Site Settings.

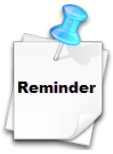
You may create an unlimited amount of Staff Picks collections. These collections can also be enabled, disabled, renamed or saved.

### 2.5.1 Adding a Collection to Staff Picks

1. After selecting Settings and Staff Picks, click **Add Staff Picks**.

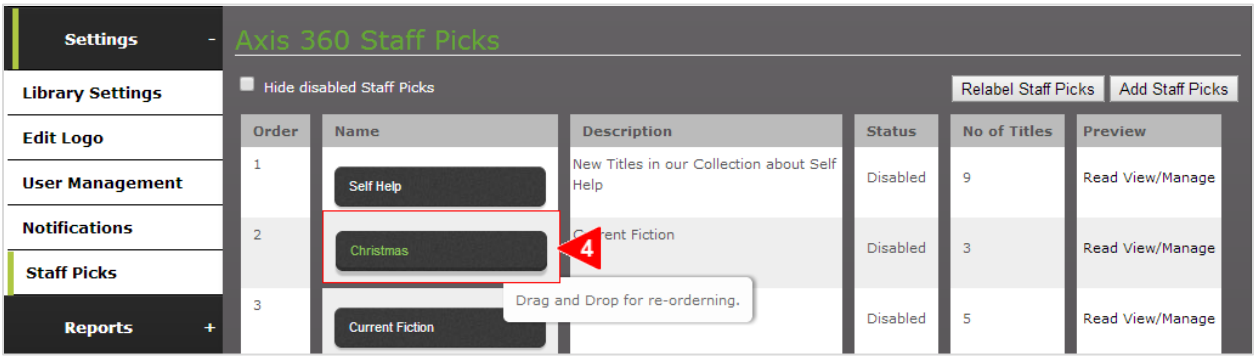



2. Enter the **Name**, **Description**, **Start Date**, **End Date**, **View Layout**, whether the list is to be **Visible to Patrons** and click **Create Staff Picks**. A confirmation message will appear.



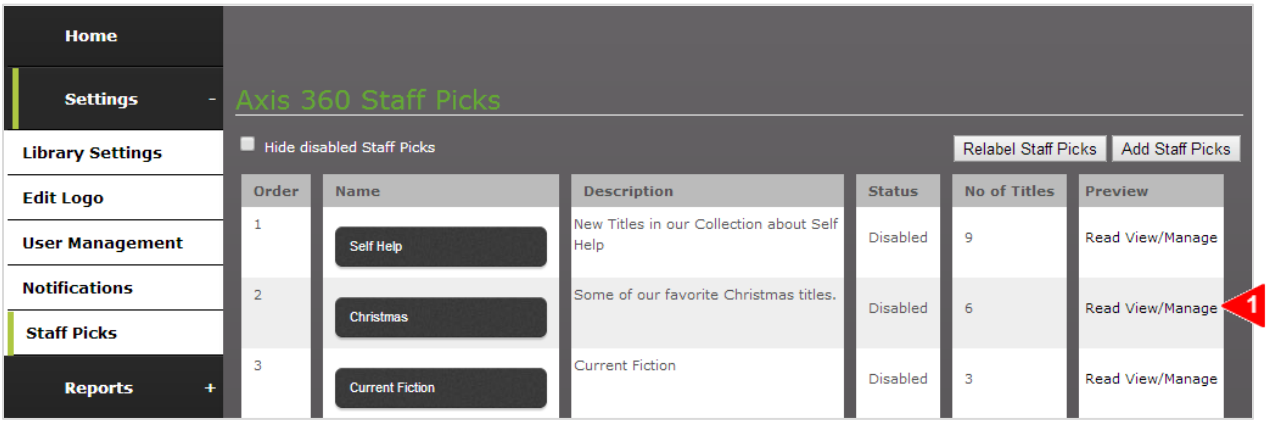

If no Staff Picks collections have been created or made visible to users, the link and page will not display on the site.

3. Click **Close**.



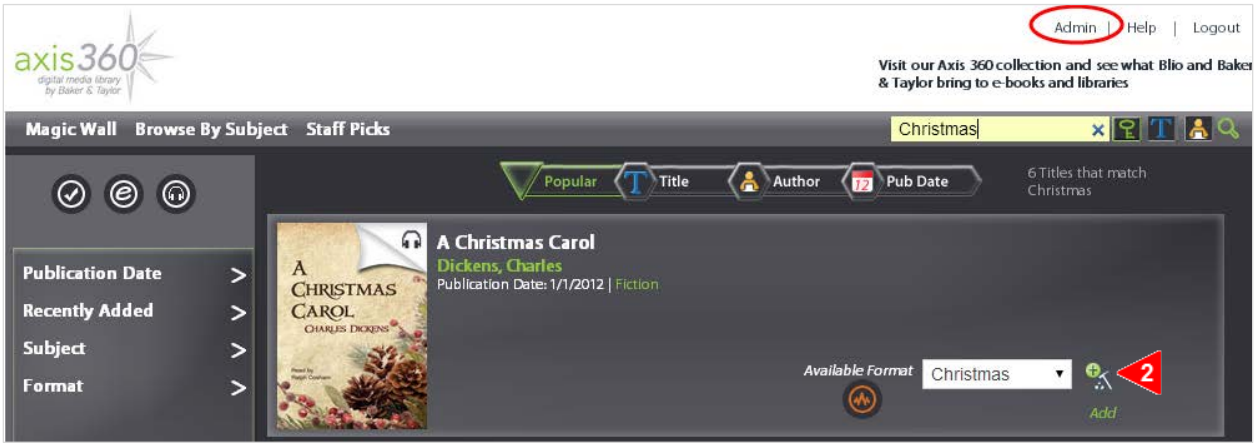

4. To order the collections on the Staff Picks page, hover over your selection. Using the mouse, left-click and hold down the mouse button. Drag the collection to the desired location. Release the left mouse button to drop the collection.

### 2.5.2 Adding Titles to a Collection



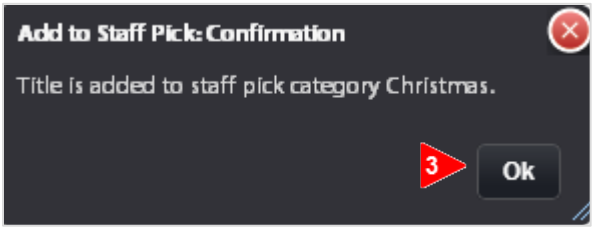

1. In the Preview column next to the desired collection, click **Read View/Manage**.

**Tip** To remove a collection, click the name of the collection and the Remove button.




From here, search or browse your Axis 360 repository using the Search icon, Magic Wall or Browse by Subject options to identify and select titles for your new Staff Picks collection. You can choose an unlimited amount of titles to add to your collection.

2. Within the Staff Picks Admin view, a drop-down box will display the names of previously created collections as well as the name of the new collection you're building. To add a title to the collection, click the drop-down arrow, select the **Collection** you would like to add the title to and click **Add**.




3. A confirmation message displays after each title is selected. Click **OK**.

   Continue selecting titles until you have completed your collection.

4. After all the titles are selected, click **View** to view all titles added to the collection.

**Tip**

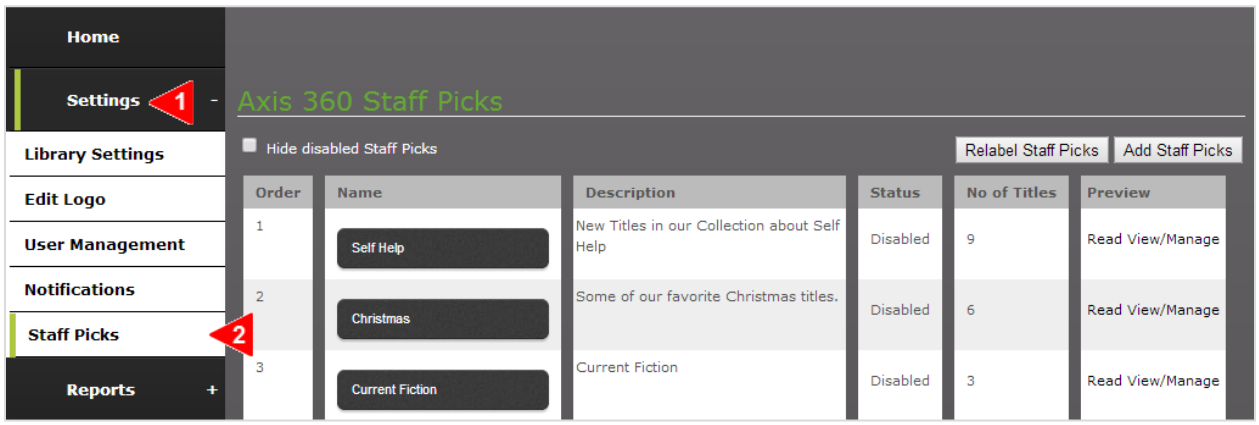
The screen layout may be changed at any time by clicking the desired option to the left of the Search icon located in the top right corner of the screen.

Admin
Logout
6
Visit our Axis 360 collection and see what Blio and Baker & Taylor bring to e-books and libraries
Magic Wall
Browse By Subject
Staff Picks
Self Help
Christmas
Magic Tree House : A Ghost Tale for Christmas Time
Murdocca, Sal (ILT) ; Osborne, Mary Pope
Product Series: A Stepping Stone Book
Publication Date: 9/14/2010 | Juvenile Fiction
5
Remove

5. If a title was added by mistake, click **Remove** and **OK**.

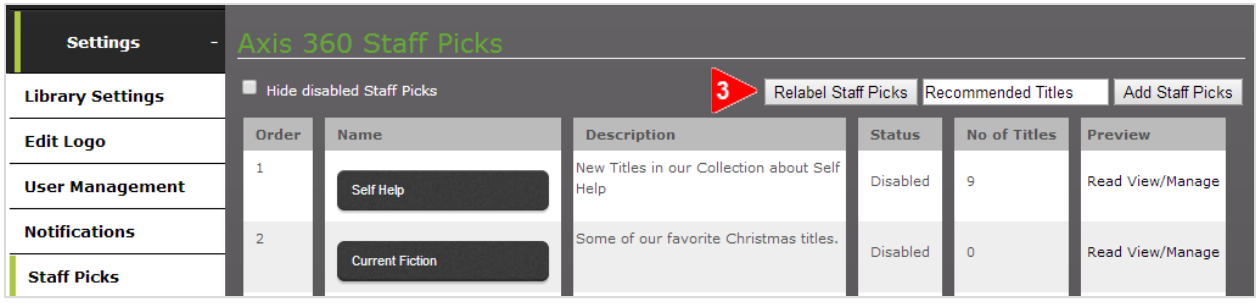
6. To return to the admin page, click **Logout** or close the window.

### 2.5.3 Relabel Staff Picks



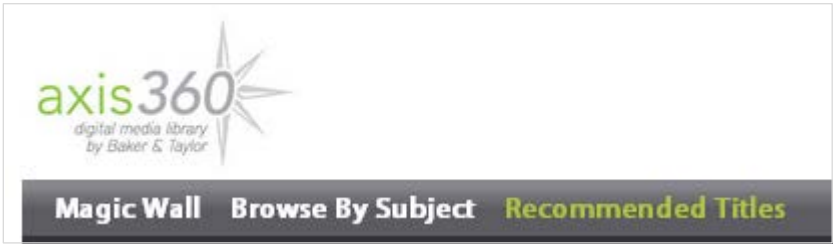

1. Click **Settings**.

2. Click **Staff Picks**.




3. Click **Relabel Staff Picks** and enter the new name for Staff Picks in the textbox.

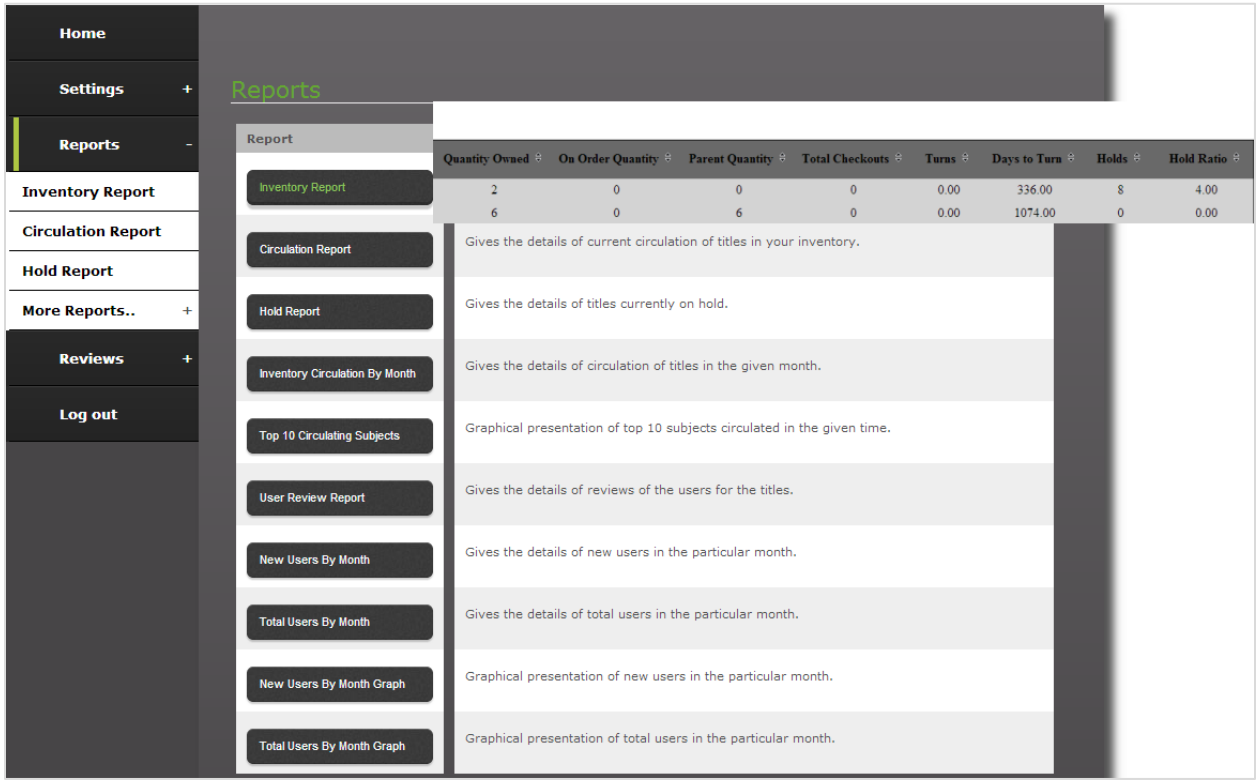
   After the new label has been entered, click the **Relabel Staff Picks** button again and a confirmation message will appear. Close the confirmation message.




The label has been changed on the site.

# 3 Reports

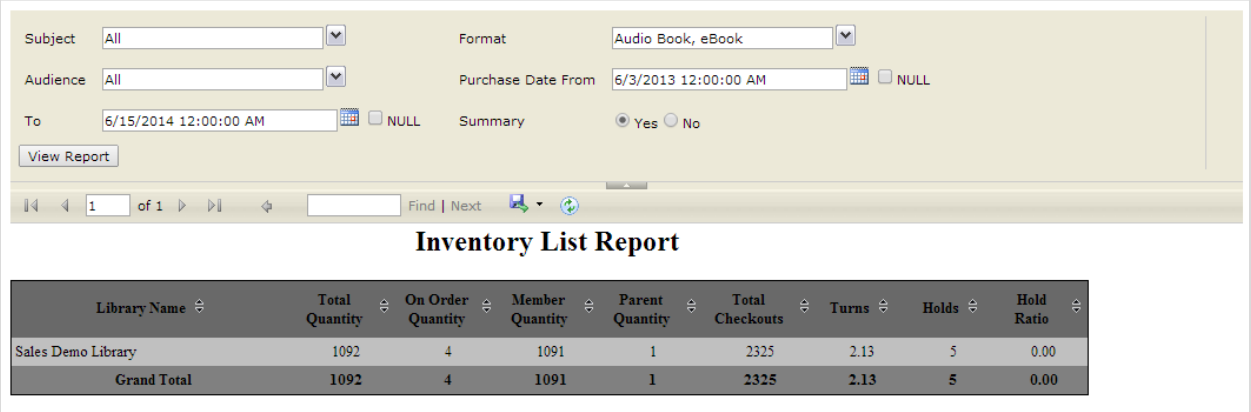
Create and download inventory, circulation, holds and user reports. Each report is described on the page and a sample of the report format displays when you hover over the report name.


Home
Settings
Reports
Inventory Report
Circulation Report
Hold Report
More Reports..
Reviews
Log out
Reports
Report
Inventory Report
Circulation Report
Hold Report
Inventory Circulation By Month
Top 10 Circulating Subjects
User Review Report
New Users By Month
Total Users By Month
New Users By Month Graph
Total Users By Month Graph
Quantity Owned
On Order Quantity
Parent Quantity
Total Checkouts
Turns
Days to Turn
Holds
Hold Ratio
2 0 0 0 0.00 336.00 8 4.00
6 0 6 0 0.00 1074.00 0 0.00
Gives the details of current circulation of titles in your inventory.
Gives the details of titles currently on hold.
Gives the details of circulation of titles in the given month.
Graphical presentation of top 10 subjects circulated in the given time.
Gives the details of reviews of the users for the titles.
Gives the details of new users in the particular month.
Gives the details of total users in the particular month.
Graphical presentation of new users in the particular month.
Graphical presentation of total users in the particular month.

## 3.1 Available Reports

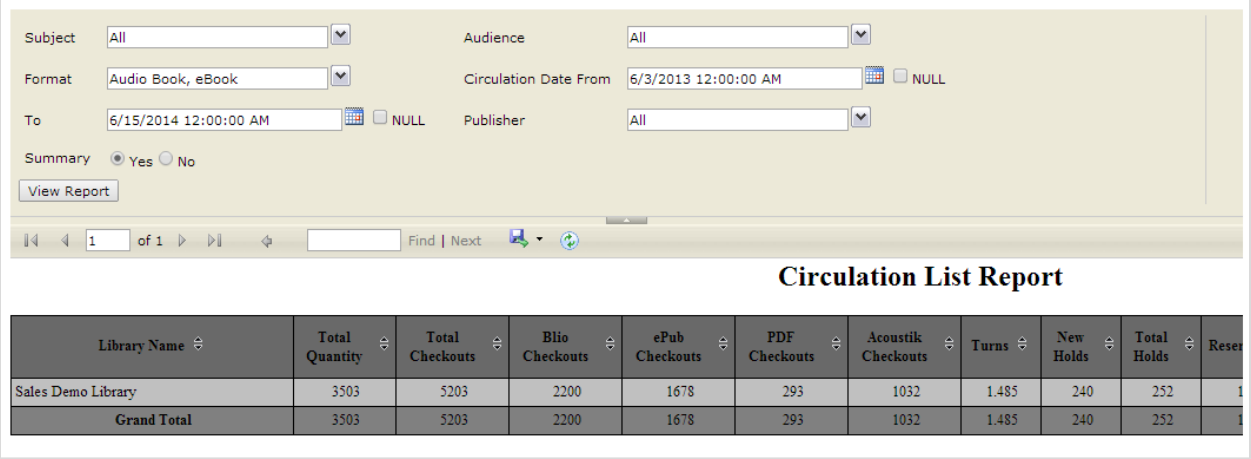
When running reports, select the button for the desired report and select the parameters. Note: Consortia Parent Libraries will have an additional filter on each report which allows them to filter by member libraries.

### 3.1.1 Inventory List Report


Subject All
Format Audio Book, eBook
Audience All
Purchase Date From 6/3/2013 12:00:00 AM NULL
To 6/15/2014 12:00:00 AM NULL
Summary Yes No
View Report
1 of 1
Find | Next
Inventory List Report
Library Name | Total Quantity | On Order Quantity | Member Quantity | Parent Quantity | Total Checkouts | Turns | Holds | Hold Ratio
Sales Demo Library 1092 4 1091 1 2325 2.13 5 0.00
Grand Total 1092 4 1091 1 2325 2.13 5 0.00

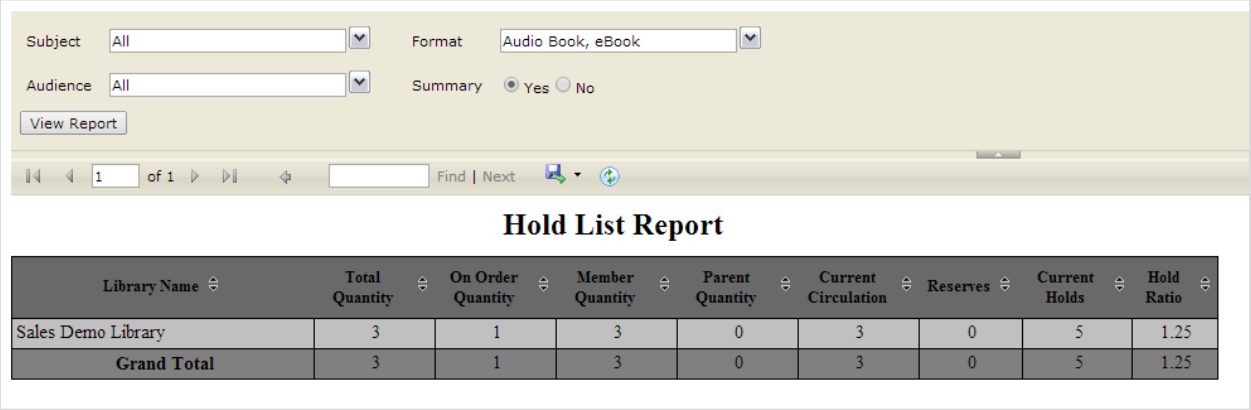
Select the desired parameters including: **Subject**, **Format** (Audio/eBooks), **Audience**, **Purchase Date From** and **To** ranges and **Summary**. Click **View Report**.

### 3.1.2 Circulation List Report


Subject All
Audience All
Format Audio Book, eBook
Circulation Date From 6/3/2013 12:00:00 AM NULL
To 6/15/2014 12:00:00 AM NULL
Publisher All
Summary Yes No
View Report
1 of 1
Find | Next
Circulation List Report
Library Name | Total Quantity | Total Checkouts | Blio Checkouts | ePub Checkouts | PDF Checkouts | Acoustik Checkouts | Turns | New Holds | Total Holds
Sales Demo Library 3503 5203 2200 1678 293 1032 1.485 240 252
Grand Total 3503 5203 2200 1678 293 1032 1.485 240 252

Select the desired parameters including: **Subject**, **Audience**, **Format** (Audio/eBooks), **Circulation Date From** and **To**, **Publisher** and **Summary**. Click **View Report**.

### 3.1.3 Hold List Report

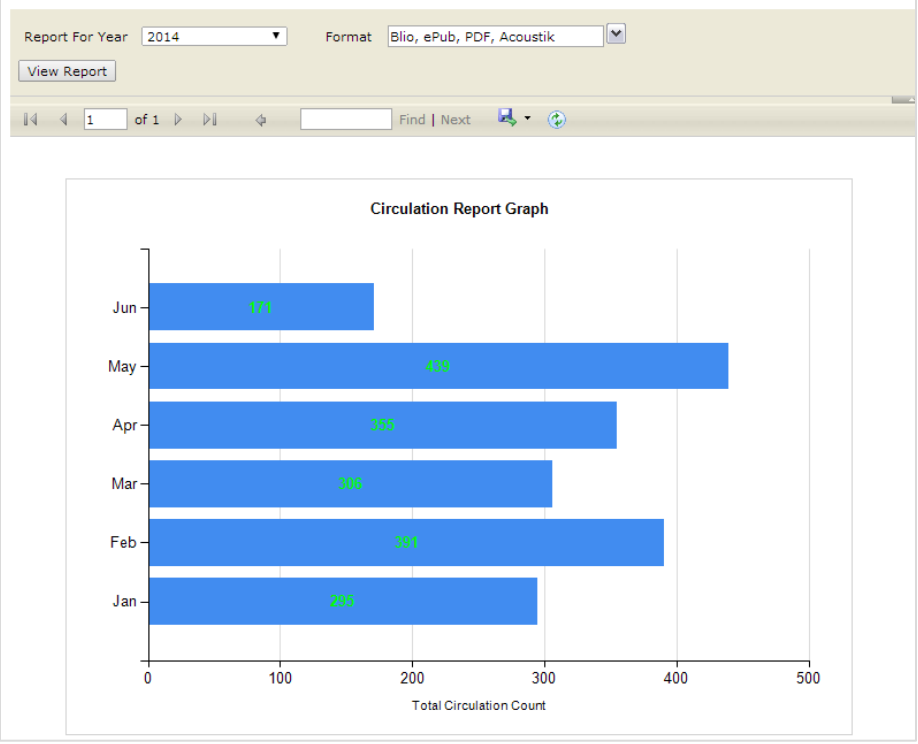



**Hold List Report**

| Library Name | Total Quantity | On Order Quantity | Member Quantity | Parent Quantity | Current Circulation | Reserves | Current Holds | Hold Ratio |
|---|---|---|---|---|---|---|---|---|
| Sales Demo Library | 3 | 1 | 3 | 0 | 3 | 0 | 5 | 1.25 |
| **Grand Total** | 3 | 1 | 3 | 0 | 3 | 0 | 5 | 1.25 |

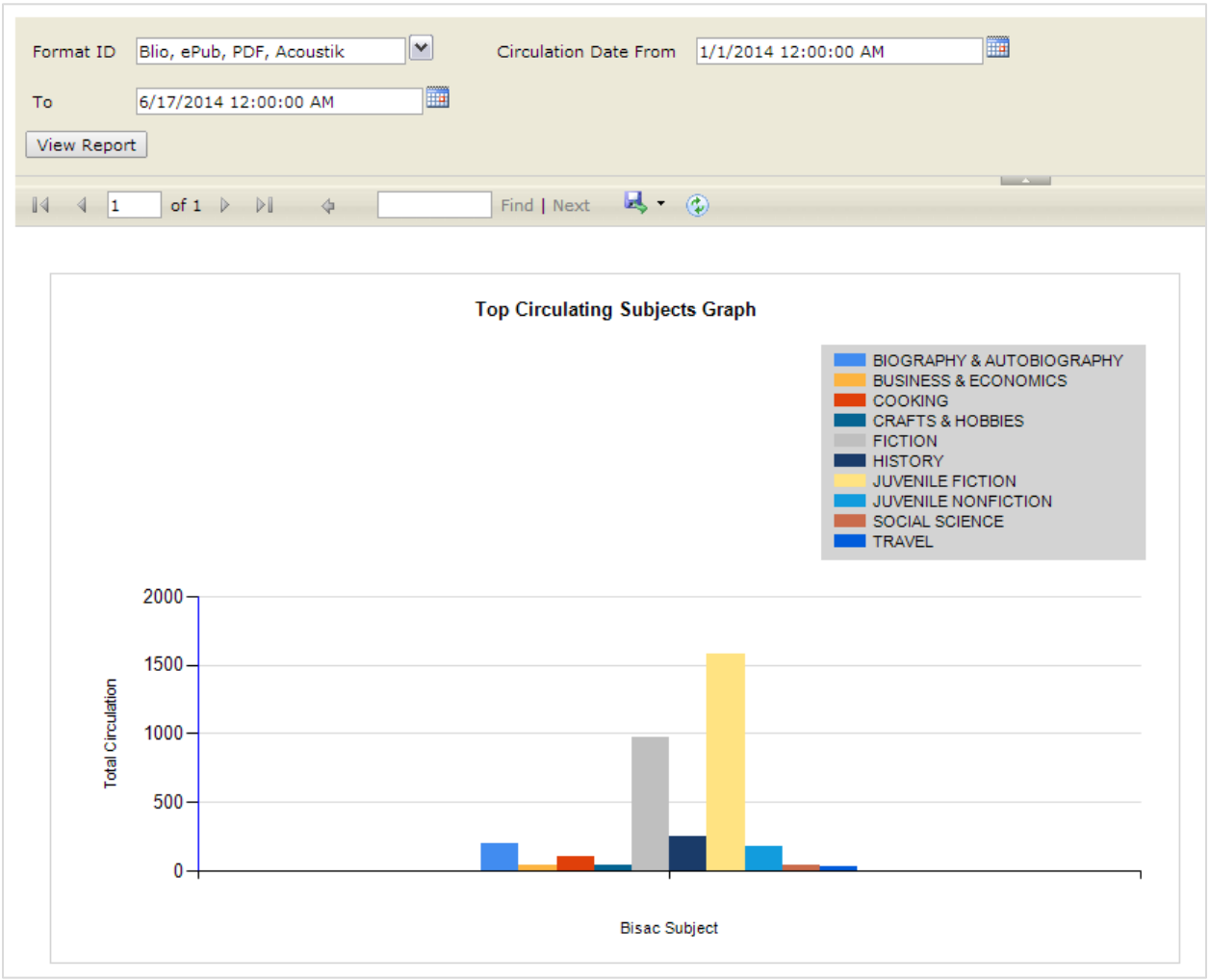
Select the desired parameters including: **Subject**, **Format** (Audio/eBooks), **Audience** and **Summary**. Click **View Report**.

### 3.1.4 Inventory Circulation by Month




Select the desired parameters including: **Report for Year** and **Format** (All, Blio, ePub, PDF Acoustik). Click **View Report**.

### 3.1.5 Top 10 Circulating Subjects



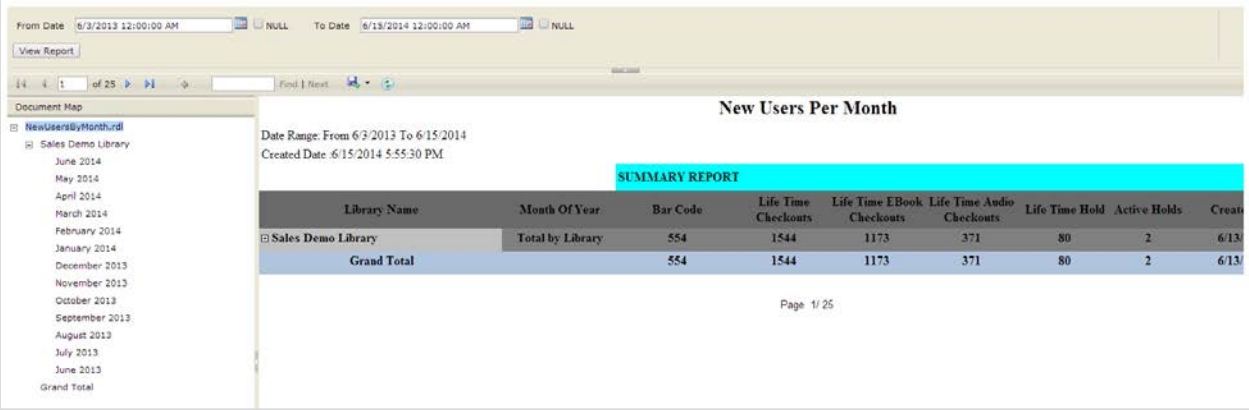

Select the desired parameters including: **Format ID**, **Circulation Date From** and **To**. Click **View Report**.

### 3.1.6 User Review Report

| Library Name | Bisac Subject | ISBN | Item ID | Title | Author | Publisher Date | Publisher | Added Date | Format | Total Quantity |
|---|---|---|---|---|---|---|---|---|---|---|
| Sales Demo Library | JUVENILE FICTION / Classics | 9781467610537 | 0012077279 | Secret Garden | Burnett, Frances Hodgson | 1/1/2012 | Inaudio | 1/15/2013 | Audio Book | 5 |
| Sales Demo Library | BIOGRAPHY & AUTOBIOGRAPHY / Cultural Heritage; SOCIAL SCIENCE / Ethnic Studies / African American Studies; HISTORY / United States / State & Local / General | 9781400129751 | 0012098700 | Hemingses of Monticello : An American Family | Gordon-Reed, Annette | 1/1/2012 | Tantor Media Inc | 1/23/2013 | Audio Book | 3 |
| Sales Demo Library | FICTION / General | 9781427224750 | 0012232357 | Middlesex | Eugenides, Jeffrey | 8/5/2012 | Macmillan | 1/23/2013 | Audio Book | 3 |
| Sales Demo Library | FICTION / Fantasy / General | 9781427243041 | 0014115090 | 47 Ronin | Vinge, Joan D. | 11/26/2013 | Macmillan | 12/4/2013 | Audio Book | 1 |
| Sales Demo Library | BIOGRAPHY & AUTOBIOGRAPHY / Entertainment & Performing Arts; BIOGRAPHY & AUTOBIOGRAPHY / Personal Memoirs | 9781478982555 | 0014271661 | Everybody's Got Something | Roberts, Robin | 4/22/2014 | Blackstone Audio Inc | 4/24/2014 | Audio Book | 1 |

Select the desired parameters including: **Format**, **Review Date From** and **To**. Click **View Report**.

### 3.1.7 New Users by Month




| Library Name | Month Of Year | Bar Code | Life Time Checkouts | Life Time EBook Checkouts | Life Time Audio Checkouts | Life Time Hold | Active Holds | Creat |
|---|---|---|---|---|---|---|---|---|
| Sales Demo Library | Total by Library | 554 | 1544 | 1173 | 371 | 80 | 2 | 6/13 |
| Grand Total | | 554 | 1544 | 1173 | 371 | 80 | 2 | 6/13 |

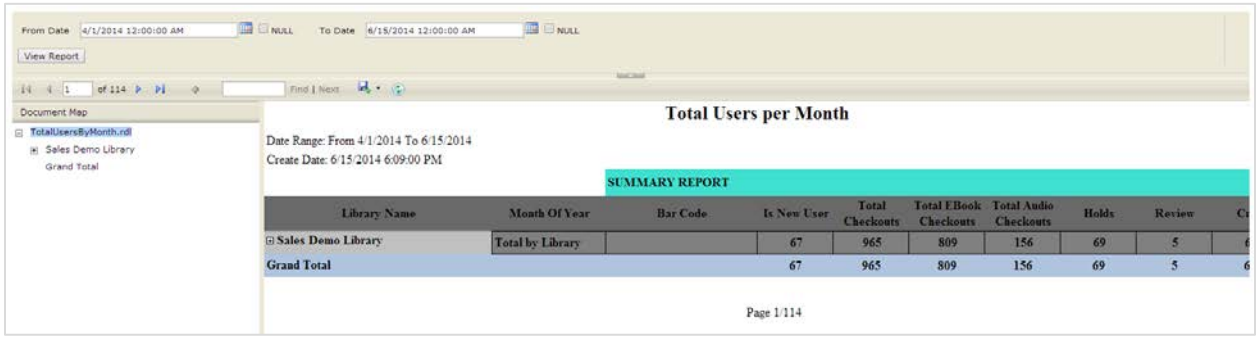
Select the desired parameters including: **From Date** and **To Date**. Click **View Report**.

The report defaults to a summary for the date range entered (Page 1 of 25). Click the **Expand** icon to the left of the name of library to show additional filtering options. To view a summary for a specific month, click the month.

From Date 6/3/2013 12:00:00 AM NULL To Date 6/15/2014 12:00:00 AM NULL
View Report
Document Map
NewUsersByMonth.rdl
Sales Demo Library
June 2014
May 2014
April 2014
March 2014
February 2014
January 2014
December 2013
November 2013
October 2013
September 2013
August 2013
July 2013
June 2013
Grand Total
New Users Per Month
Date Range: From 6/3/2013 To 6/15/2014
Created Date :6/15/2014 5:57:09 PM
Sales Demo Library
Month Of Year | Bar Code | LifeTime EBook Checkouts | LifeTime Audio Checkouts | Life Time Checkouts | Life Time Holds | Active Holds | Create Date | Last Checkout Date | Last Hold
June 2014 | WW6166650 | 11 | 1 | 12 | 0 | 0 | 6/1/2014 | 6/8/2014
WW269400 | 6 | 2 | 8 | 0 | 0 | 6/8/2014 | 6/12/2014
MLS7463318 | 5 | 0 | 5 | 0 | 0 | 6/11/2014 | 6/11/2014
WW99423723 | 4 | 0 | 4 | 0 | 0 | 6/2/2014 | 6/5/2014
WW8807011 | 3 | 0 | 3 | 1 | 0 | 6/4/2014 | 6/11/2014
BT4232702 | 2 | 0 | 2 | 0 | 0 | 6/9/2014 | 6/12/2014
WW0408696184 | 2 | 0 | 2 | 0 | 0 | 6/9/2014 | 6/10/2014

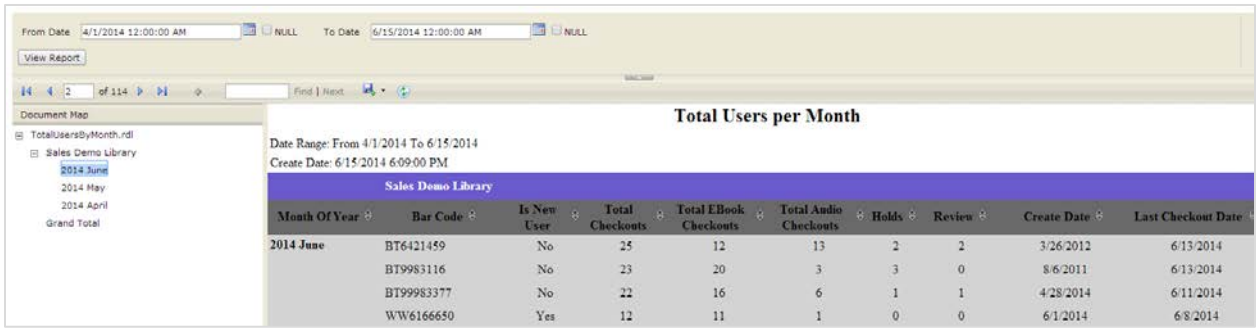
To view additional pages of the report, click the **Next Page** arrow.

### 3.1.8 Total Users by Month


From Date 4/1/2014 12:00:00 AM NULL To Date 6/15/2014 12:00:00 AM NULL
View Report
Document Map
TotalUsersByMonth.rdl
Sales Demo Library
Grand Total
Total Users per Month
Date Range: From 4/1/2014 To 6/15/2014
Create Date: 6/15/2014 6:09:00 PM
SUMMARY REPORT
Library Name | Month Of Year | Bar Code | Is New User | Total Checkouts | Total EBook Checkouts | Total Audio Checkouts | Holds | Review
Sales Demo Library | Total by Library | 67 | 965 | 809 | 156 | 69 | 5
Grand Total | 67 | 965 | 809 | 156 | 69 | 5
Page 1/114

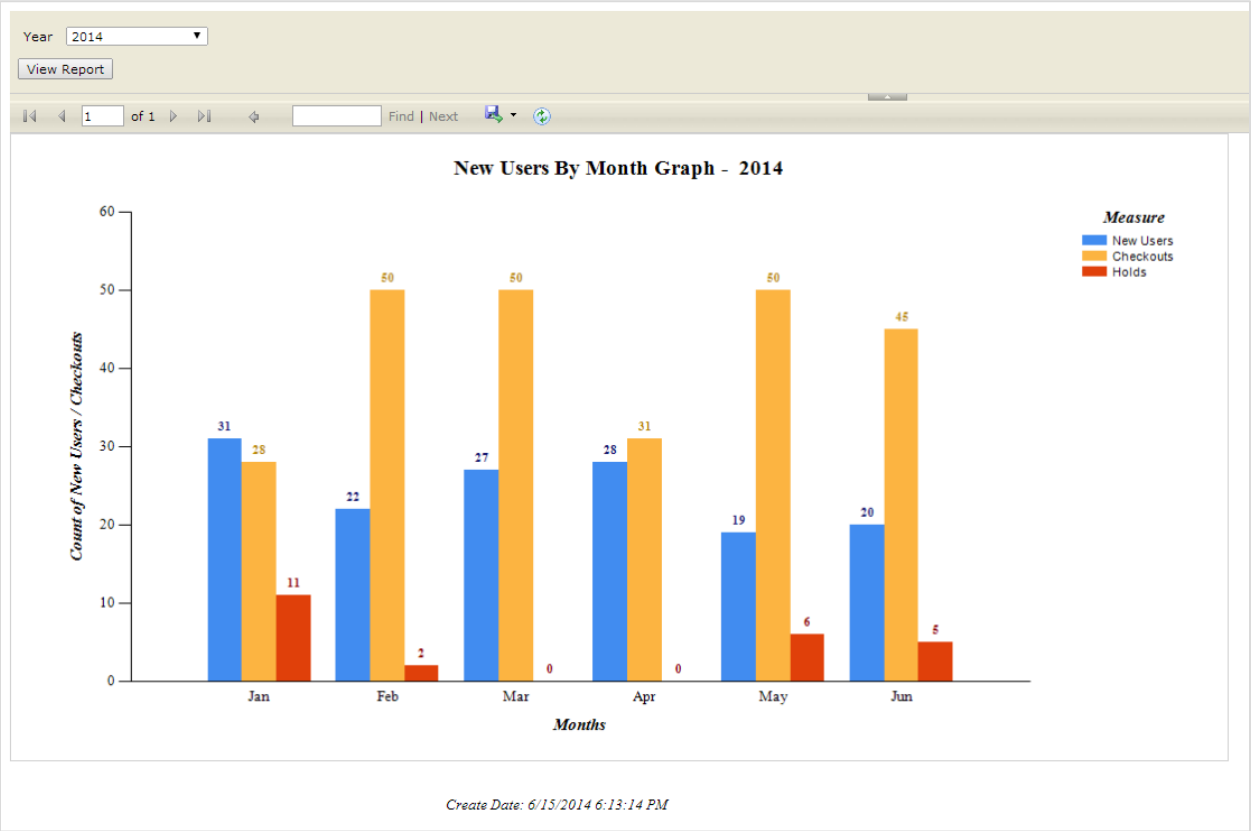
Select the desired parameters including: **From Date** and **To Date**. Click **View Report**.

The report defaults to a summary for the date range entered (Page 1 of 114). Click the **Expand** icon to the left of the name of library to show additional filtering options. To view a summary for a specific month, click the month.


From Date 4/1/2014 12:00:00 AM NULL To Date 6/15/2014 12:00:00 AM NULL
View Report
Document Map
TotalUsersByMonth.rdl
Sales Demo Library
2014 June
2014 May
2014 April
Grand Total
Total Users per Month
Date Range: From 4/1/2014 To 6/15/2014
Create Date: 6/15/2014 6:09:00 PM
Sales Demo Library
Month Of Year | Bar Code | Is New User | Total Checkouts | Total EBook Checkouts | Total Audio Checkouts | Holds | Review | Create Date | Last Checkout Date
2014 June | BT6421459 | No | 25 | 12 | 13 | 2 | 2 | 3/26/2012 | 6/13/2014
BT9983116 | No | 23 | 20 | 3 | 3 | 0 | 8/6/2011 | 6/13/2014
BT99983377 | No | 22 | 16 | 6 | 1 | 1 | 4/28/2014 | 6/11/2014
WW6166650 | Yes | 12 | 11 | 1 | 0 | 0 | 6/1/2014 | 6/8/2014

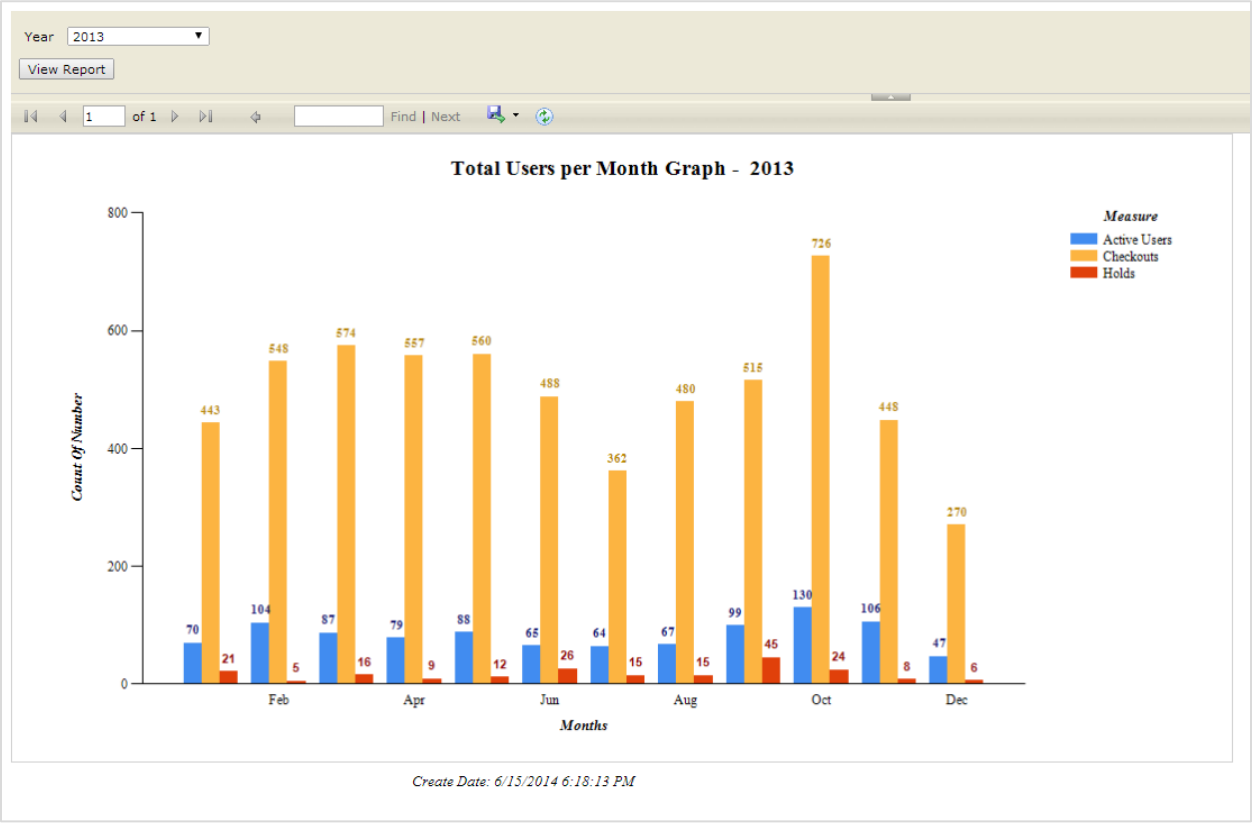
To view additional pages of the report, click the **Next Page** arrow.

### 3.1.9 New Users by Month Graph




Select the desired **Year**. Click **View Report.**

### 3.1.10 Total Users by Month Graph




Select the desired **Year**. Click **View Report**.

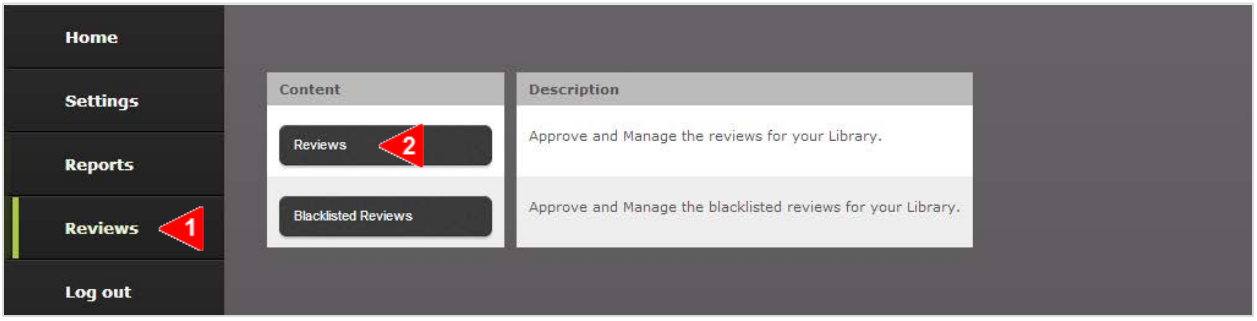
# 4 Reviews

Using the options under Settings > Library Settings, you can control the site display which includes if reviews are enabled on your site. If you reviews are enabled, the functionality below is available.

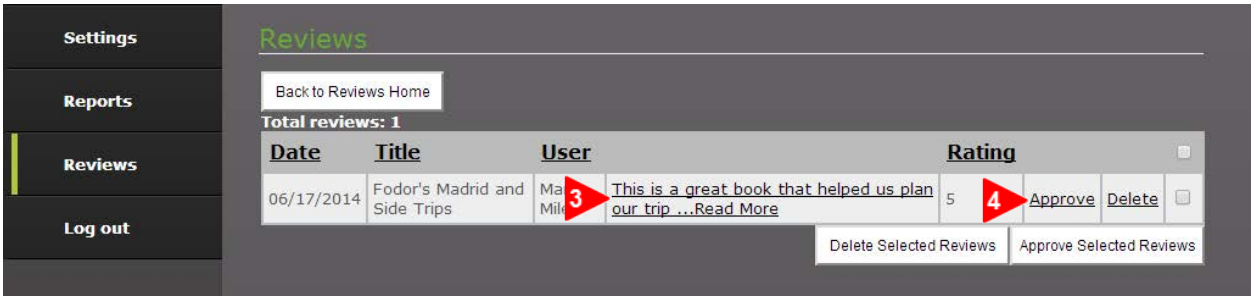
## 4.1 Reviews

You have access to user title reviews, which must be approved before they are visible on the site. The text cannot be edited; reviews are either approved or rejected in full.

### 4.1.1 Approve or Delete Reviews




1. Reviews may be accessed by clicking **Reviews** or **Home** from the main menu.
2. Click **Reviews**.



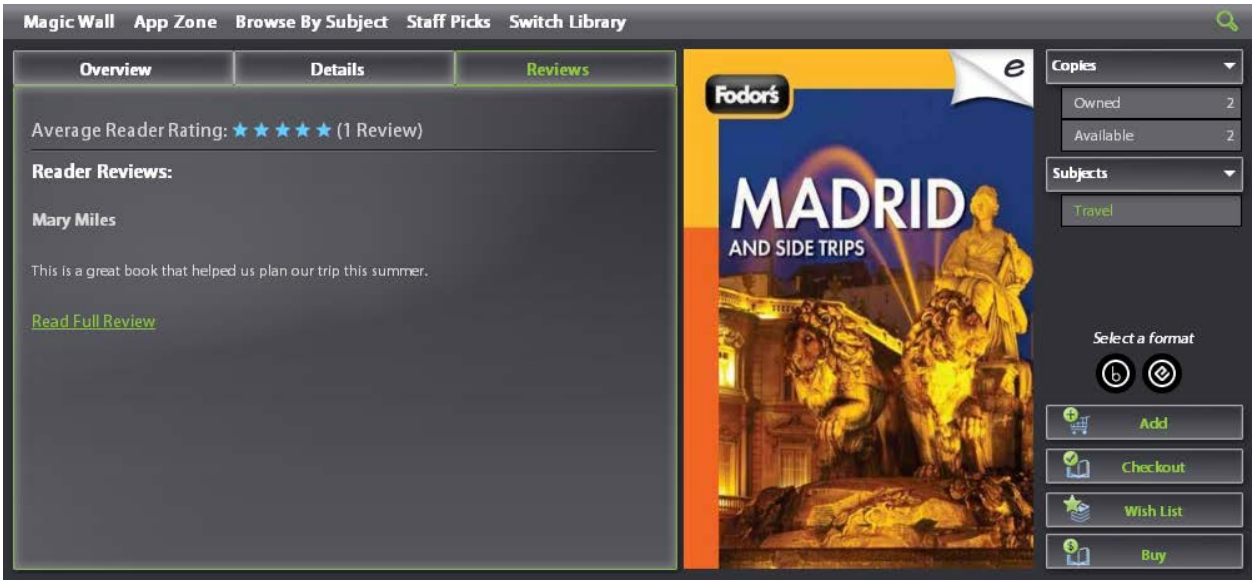

All pending reviews submitted by users will display. Reviews can be approved or deleted. If a review is approved, it will then display on the site.

3. To read a complete review, click the **hyperlink** for the review.

4. To approve a review, click **Approve**. To delete a review, click the **Delete**.

Tip

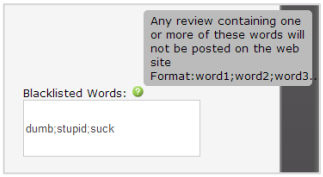
To approve multiple reviews at once, click the checkbox to the right of each review and click the **Approve Selected Reviews** button.

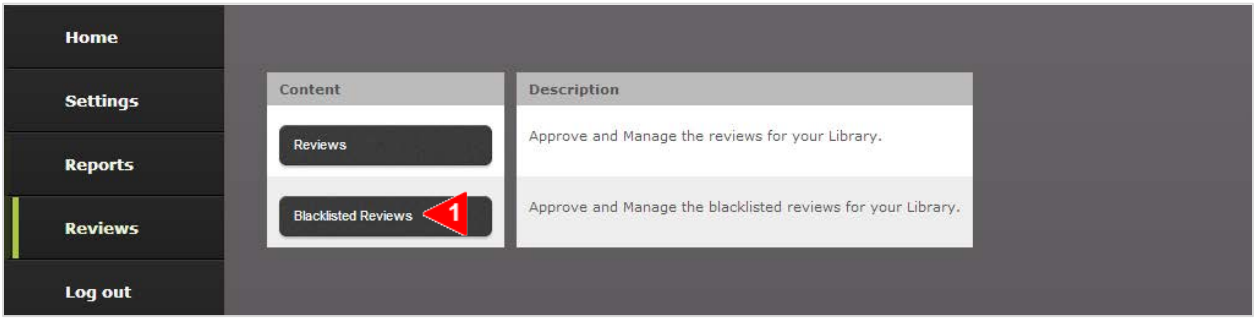



Approved reviews are posted to the site immediately and display on the Reviews tab for the title.

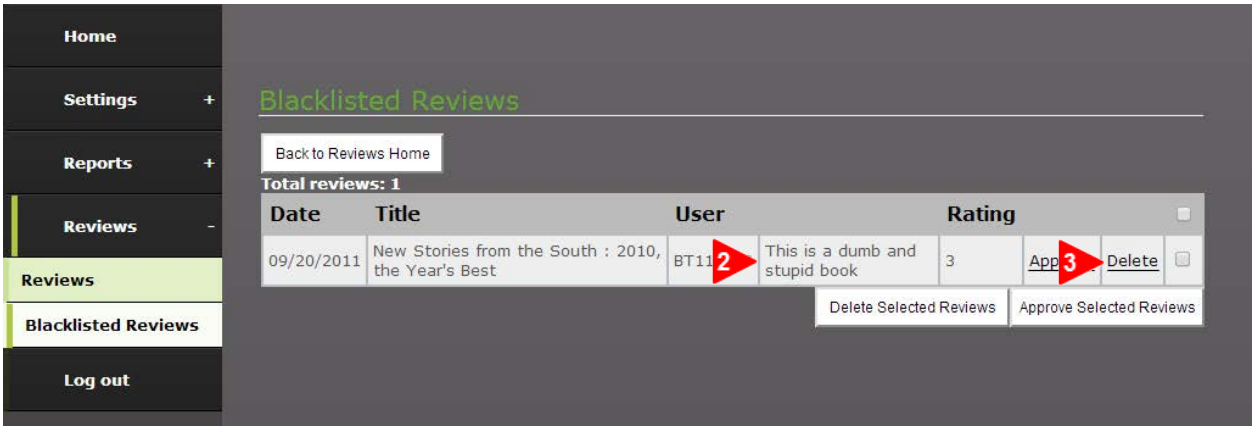
### 4.1.2 Blacklisted Reviews

Reviews submitted by users that contain any of the words entered in the Blacklisted Words field under Library Settings will display under Blacklisted Reviews. Blacklisted Reviews can be approved (and will display on the site immediately) or deleted.


Any review containing one or more of these words will not be posted on the web site
Format:word1;word2;word3...
Blacklisted Words:
dumb;stupid;suck




1. After selecting Reviews, click **Blacklisted Reviews**.




This will display all pending reviews that contain words matching any of the Blacklisted Words.

2. If the entire review does not display, a hyperlink appears. To read the complete review, click the hyperlink. In this example, the entire review fits in the space provided.

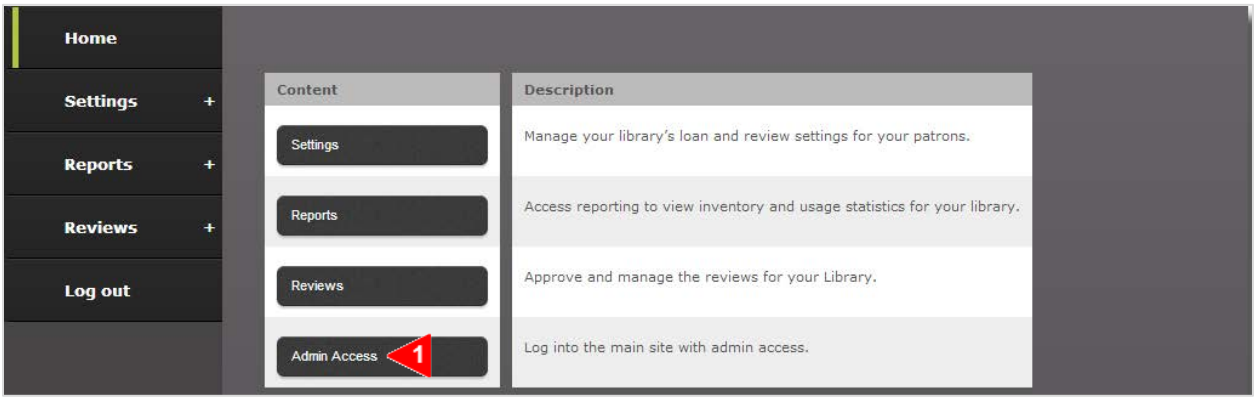
3. To approve a review, click **Approve**. To delete a review, click **Delete**.

# 5 Appendix

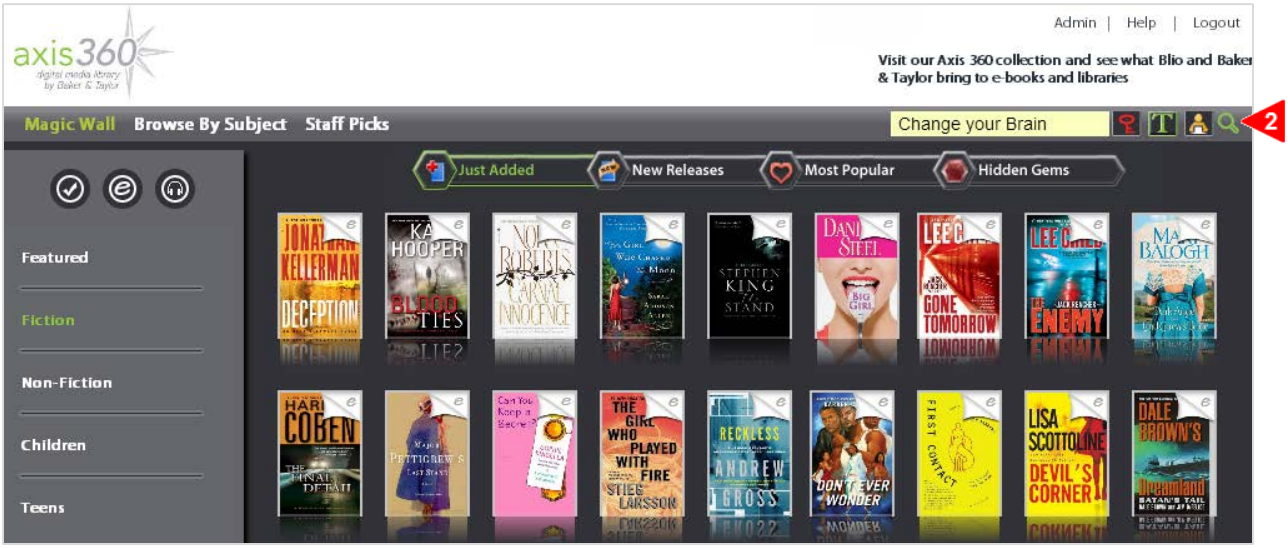
## 5.1 Hold Queue Management

You may move users up and down in the Hold Queue.

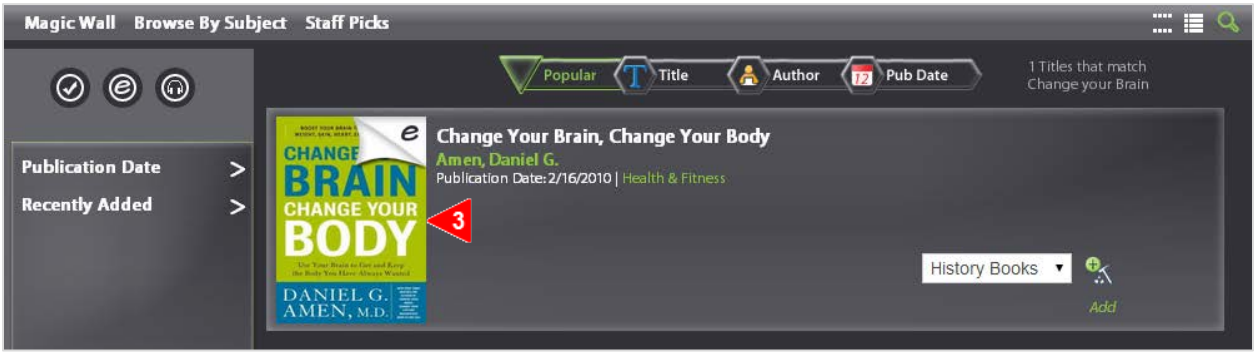
### 5.1.1 Move Users in the Hold Queue



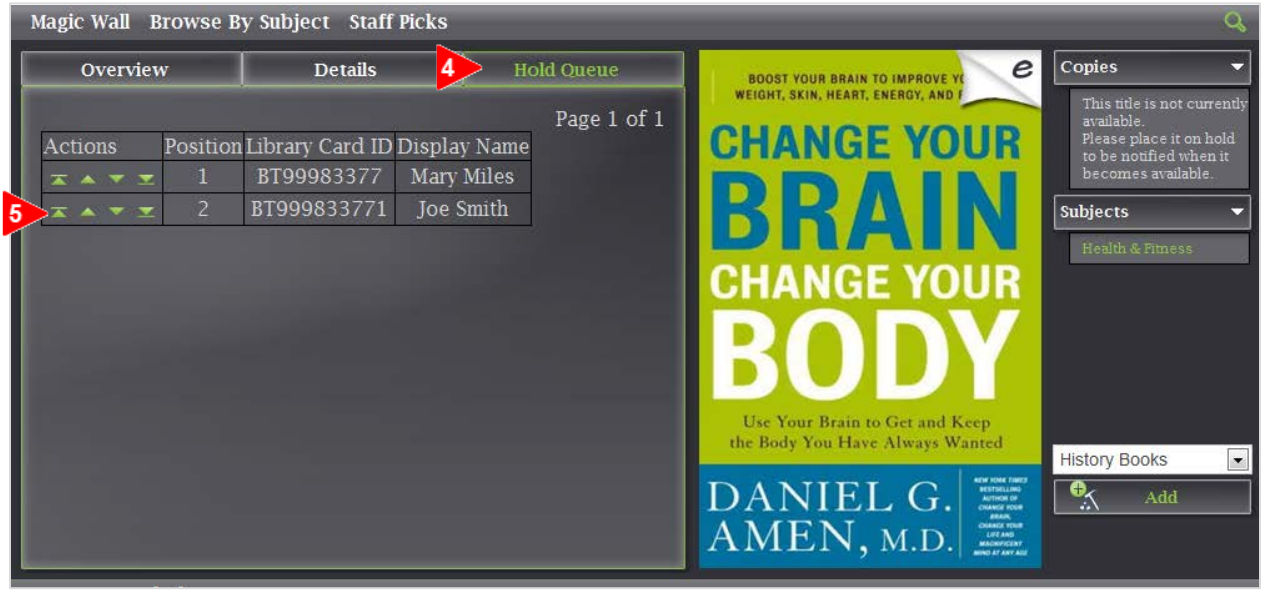

1. From the home page, click **Admin Access**.




2. Click the **Search** icon and enter the title. Click the **Title** icon and click **Search** again, or press Enter.




3. Click the **Title**.




4. Click **Hold Queue**.

5. To move users in the Hold Queue, click the **up** or **down arrow** in the Actions column next to the desired user. The changes in position are automatically saved.